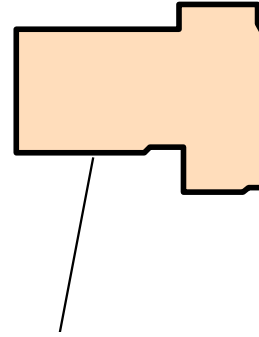
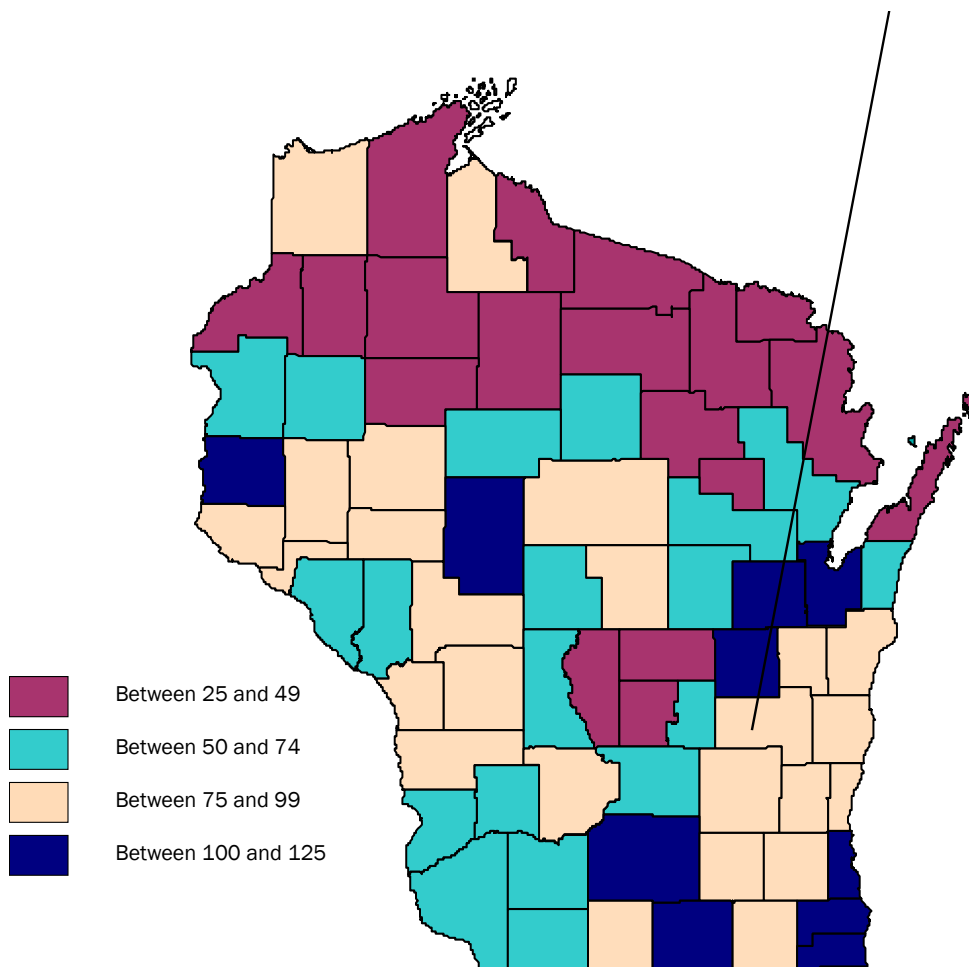


Fond du Lac County Workforce Profile



The number of residents aged 25-29 years for every
100 residents aged 60-64 years in year 2025



Source: Wisconsin Department of Administration, Demographic Services Center and the U.S. Bureau of Census.

For comparison, it is projected that there will be 90 residents aged 25-29 for every 100 residents aged 60-64 in Wisconsin in 2025. Nationally, it is projected that there will be 101 residents aged 25-29 for every 100 residents aged 60-64. In 2003, Wisconsin had 146 residents aged 25-29 for every 100 aged 60-64.



County Population

Since the 2000 Census, Fond du Lac County's population has increased by over 2,300 residents. The rate of increase of 2.4 percent is below the state's and nation's growth rates for the period. The state as a whole is older than the national average, with a lower birthrate and lower net migration. The slower growth rate in the

662 and a growth rate of 1.6 percent. The county will officially be designated as a metropolitan statistical area (MSA) in the State of Wisconsin beginning in 2005. Generally metropolitan areas tend to follow national trends more than non-metropolitan areas. This may not occur in Fond du Lac as it is just transitioning to a metropolitan county.

Total Population

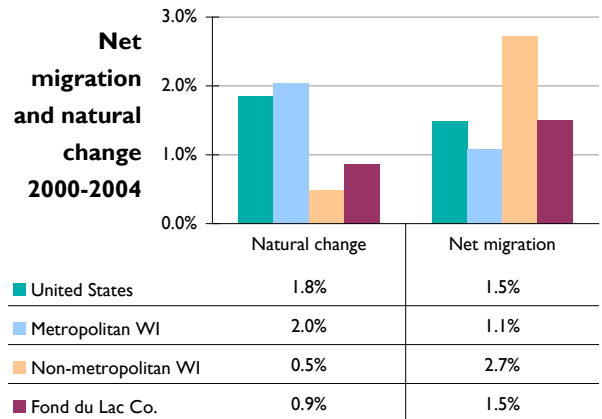
	April 2000 Census	Jan. 1, 2004 estimate	Numeric change	Percent change
United States	281,421,906	292,287,454	10,865,548	3.9%
Wisconsin	5,363,704	5,532,000	168,296	3.1%
Fond du Lac County	97,296	99,608	2,312	2.4%
Largest Municipalities				
Fond du Lac, City	42,203	42,865	662	1.6%
Ripon, City	7,450	7,619	169	2.3%
N. Fond du Lac, Village	4,557	4,729	172	3.8%
Taycheedah, Town	3,666	3,810	144	3.9%
Waupun, City*	3,282	3,323	41	1.2%
Empire, Town	2,620	2,736	116	4.4%
Friendship, Town	2,406	2,484	78	3.2%
Fond du Lac, Town	2,027	2,306	279	13.8%
Auburn, Town	2,075	2,187	112	5.4%
Campbellsport, Village	1,913	1,938	25	1.3%

*Fond du Lac County portion only

Source: Wis. Dept. of Administration, Demographic Services and U. S. Census Bureau

county continues a trend going back to 1990. The county had a growth rate of 8.0 percent over the decade, just under the national and state growth rates. The current population is just under 100,000 at 99,608.

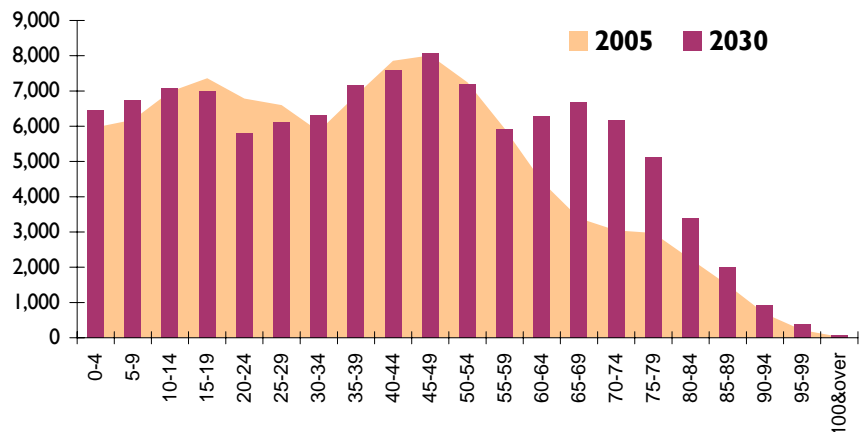
The largest percentage of population growth in the county comes from net migration, the difference between people moving to the county minus those leaving it. Over 60 percent of the growth has occurred from this source compared to natural increase, births minus deaths. This is related in part to the aging of the population, with a larger portion of the population near or past their child bearing years.



Source: WI Dept. of Admin., Demographic Services and U. S. Census Bureau

All of the ten largest municipalities in the county showed growth during the last four years. However the growth rates in the municipalities varied widely. This is due to many factors, such as birth rates, net migration, gain or loss of population through annexation and limitations such as being "landlocked". The Town of Fond du Lac had the fastest growth rate of 13.8 percent. The next fastest growing community was the Town of Auburn at 5.4 percent. The City of Fond du Lac, the largest municipality in the county added the most residents, with an increase of

Population by Age Groups in Fond du Lac County



Source: WI Dept. of Administration, Demographic Services

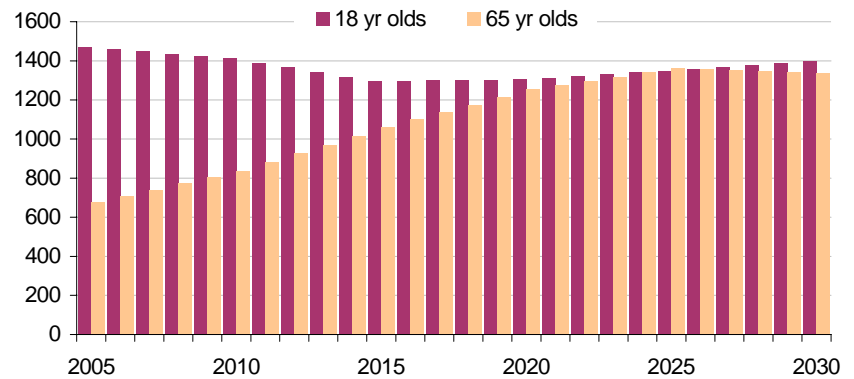
Future Population and Labor Supply

Like the State of Wisconsin, the population in the county is aging although it is also adding a younger population through net migration. This will have a continuing impact of future growth in the county.

Like most counties in the state, Fond du Lac is aging. By 2030 the county will have a larger portion of workers of retirement age than it currently has. Currently a larger portion of the population are in the middle-aged brackets. Labor force participation is highest in the middle age groups. This was great when most of the population was middle-aged. Nationally, labor force participation is increasing faster among the non-white populations while it is declining in white populations. Participation is also increasing in the older age groups.

Based on current projections, the number reaching age 65 will exceed those turning age 18 for about a six year period beginning just after 2020. Although not everyone will retire at age 65, a large portion do or at least hope to. This may be offset somewhat by changes in the social security law. On the other hand, not everyone age 18 enters the labor force either. Some may

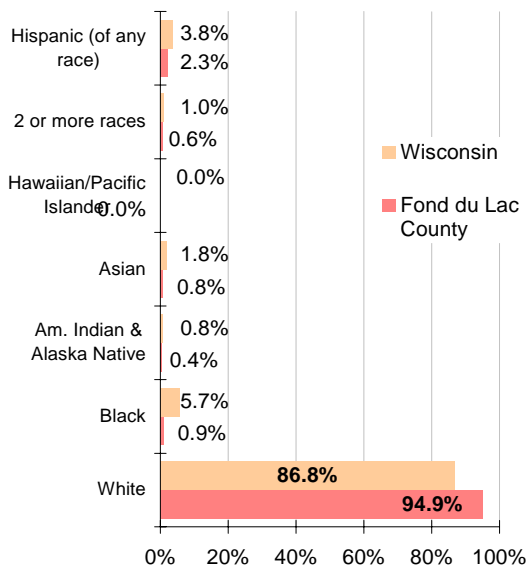
Convergence of 18 & 65 year old population in Fond du Lac County



Source: WI Dept. of Administration, Demographic Services

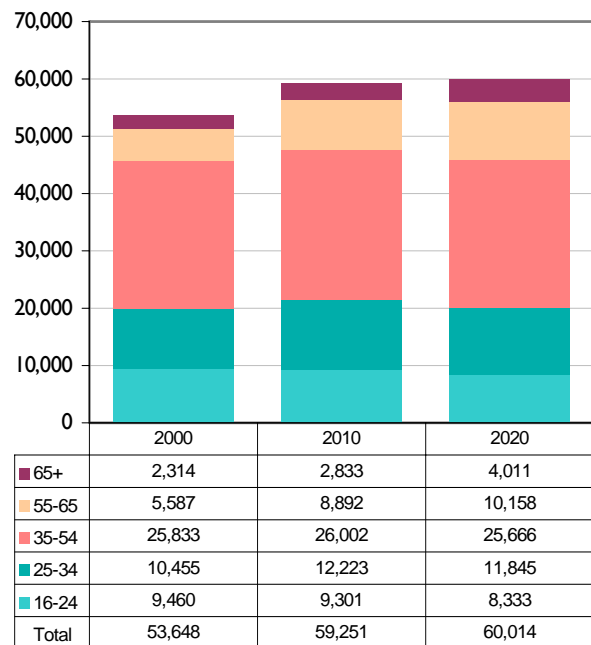
continue in school while others may move away. The end result will be a possible labor shortage of replacement workers over the next 20 years. This may have an impact on future economic growth if there are only enough workers to replace current workers leaving the labor force. This does not take into account the changes that technology will have on occupations during that time.

Race and ethnic distribution



Source: U.S. Census 2000, SF-3, table P-6

Fond du Lac County Labor Force Projections by Age



Decade change	13.3%	10.4%	1.3%

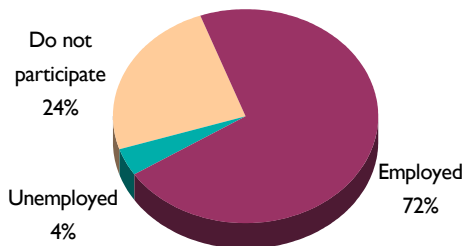
Source: DVD, Office of Economic Advisors, August 2004

Current Labor Force

Labor force participation represents the share of the population that is 16 years and older that is either employed or unemployed. Participation rates in Wisconsin and the United States in 2003 were 72.9 and 66.3 percent, respectively.

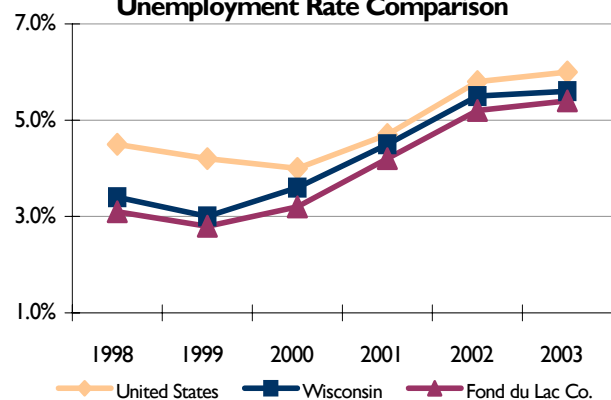
choose not to work including retirees and those currently unable to work. As the population ages, more retirees will be included in the category of choosing not to work and labor force participation rates will decline.

Labor force participation in Fond du Lac County



Source: DWD, Office of Economic Advisors, July 2004

Unemployment Rate Comparison



The participation rate in Fond du Lac County was 76 percent in 2003. That leaves 24 percent of the county's population age 16 years and older not participating in the labor force as a potential labor pool to draw on during times of tight labor supply. This group includes some students and individuals who

Fond du Lac County Civilian Labor Force Data

	1998	1999	2000	2001	2002	2003
Labor Force	54,824	53,122	54,993	56,605	56,519	57,219
Employed	53,130	51,653	53,230	54,214	53,591	54,109
Unemployed	1,694	1,469	1,763	2,391	2,928	3,110
Unemployment Rate	3.1%	2.8%	3.2%	4.2%	5.2%	5.4%

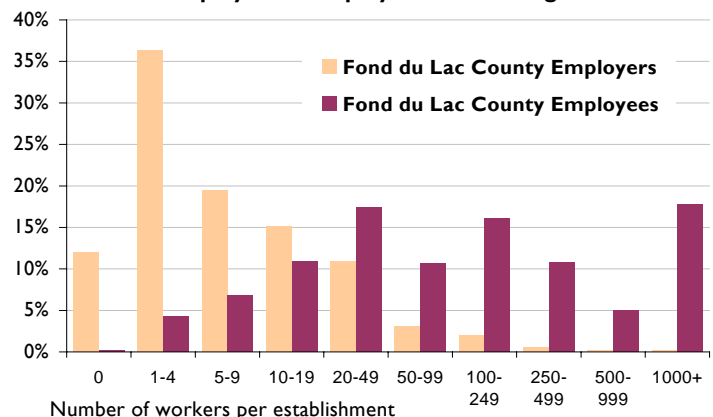
Source: WI DWD, Bur. of Workforce Information, Local Area Unemployment Statistics, 2003

Employers by Size

Nearly 80 percent of the county's employers have fewer than 20 workers. However, they only provide about 20 percent of the county's jobs. Although they do not currently provide a large portion of the county's jobs, this is often where future growth lies.

These companies are often the large companies of the future and collectively may have faster growth rates than their large counterparts. A healthy community will have a good mix of both large and small firms to encourage continuing economic growth and at the same time promote stable and sustainable environment to allow economic churn and growth in the region.

Share of employers & employees in size range in 2003



Source: DWD, Bureau of Workforce Information, Table 221, July 2004

Industry & employers by size

With over one-fourth of the jobs in the county in manufacturing, double the national average, it is not surprising to see manufacturing twice in the ten largest industries in the county. Like the state and nation, the number of jobs in this sector has decreased over the last five years, but it still plays a very important role in the economy of the county. The government sector in

the list includes all forms of government, excluding schools which is included in the educational services industry. Employment in the top ten industries makes up nearly one-half of the jobs in the county. Five of top ten employers in the county have over 1,000 workers. Out of over 2,300 public and private employers, these ten provide 25 percent of the county's jobs.

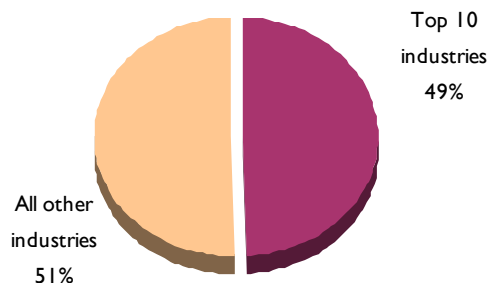
Top 10 Industries in Fond du Lac County

Industry	March 2004		Numeric Employment Change	
	Establishments	Employees	2003-2004	1999-2004
Machinery manufacturing	22	4,894	not avail.	-204
Educational services	23	3,868	207	377
Food services & drinking places	166	3,651	185	421
Food manufacturing	20	1,924	-72	47
Executive, legislative, & gen government	32	1,770	-20	-80
Hospitals	suppressed	suppressed	not avail.	not avail.
Specialty trade contractors	167	1,515	134	76
Ambulatory health care services	102	1,434	72	246
Nursing & residential care facilities	24	1,304	45	182
General merchandise stores	suppressed	suppressed	not avail.	not avail.

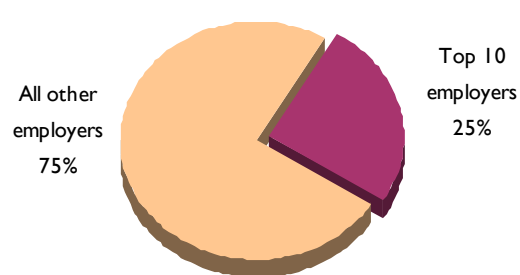
Top 10 Employers in Fond du Lac County

Establishment	Product or Service	Size (Dec. 2003)
Brunswick Corp. (Mercury Marine)	Outboard engine equipment manufacturing	Over 999 employees
Intl Paper Co. (FDL Container)	Corrugated and solid fiber box manufacturing	Over 999 employees
Agnesian Healthcare Inc.	General medical and surgical hospitals	Over 999 employees
Fond du Lac School District	Elementary and secondary schools	Over 999 employees
County of Fond du Lac	Executive and legislative offices, combined	Over 999 employees
Alliance Laundry Systems LLC	Household laundry equipment manufacturing	500-999 employees
Moraine Park Technical College	Junior colleges	500-999 employees
J F Ahern Co.	Fire alarm systems	500-999 employees
Charter Comm Holding Company LLC	Cable and other program distribution	500-999 employees
Ultra Mart Foods Inc.	Retail bakeries	250-499 employees

Share of jobs in top 10 industries in Fond du Lac County



Share of Fond du Lac County jobs with top 10 employers

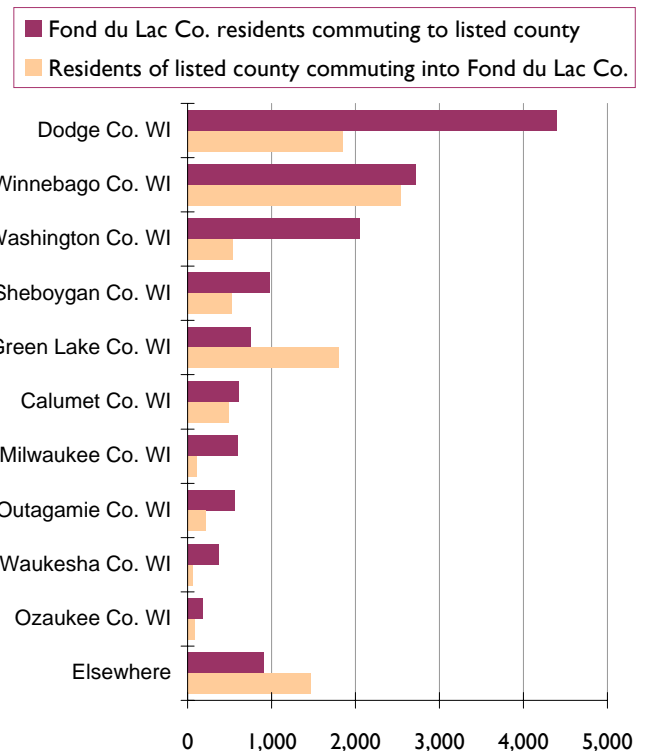


Source: DWD, Bureau of Workforce Information, Quarterly Census of Employment and Wages

Commuting

Looking at the county's commuting patterns helps determine if the area draws workers, or if the workers have selected to live in the area, but find better job opportunities in other areas. The census looks at commuting patterns every ten years and, while the numbers may change during that period, in most cases the pattern has been going on for decades.

Fond du Lac County is a net exporter of workers. It loses more workers to the surrounding counties than it gains from them. Over 14,000 workers leave the county for work, while 9,700 come into the county for employment, a net loss of over 4,400 workers. Some of these workers may only be commuting a few miles. A good example would be with Dodge County. The City of Waupun lies in both counties. So it is possible for workers to never leave the city when they go to work, but in fact are leaving the county. Dodge County is where the largest loss of workers occurs. Over 2,500 more workers leave Fond du Lac for work in Dodge County.



Source: U.S. Census 2000, Special tabulations: Worker Flow Files

Key occupations & wages

The table to the right includes occupations that are common in the area. The list is not all inclusive and for information on additional occupations refer to the Office of Economic Advisors website: <http://dwd.wisconsin.gov/oea/>. Wage tables are general guides to what is happening in the local labor market. The surveys sent to approximately one-third of the employers in the state every year.

The surveys provide assistance to workers in knowing their worth on the market as well as employers that are looking to hire new workers and want to know what the "going rate" is. Note the table excludes the top and bottom 25 percent of wages, so there will be instances when the wages will be either above or below those listed on the table.

Occupation title	Hourly Wages			
	Mean	Percentile		
		25 th	50 th	75 th
Cashiers	\$7.61	\$6.45	\$7.44	\$8.53
Retail salespersons	\$10.20	\$6.78	\$8.21	\$11.73
Janitors & cleaners, except maids & hskpg. cleaners	\$9.19	\$7.59	\$8.92	\$10.59
Comb. food prep.& serving workers (fast food)	\$8.29	\$6.56	\$7.99	\$9.85
Team assemblers	\$12.45	\$9.56	\$11.99	\$14.87
Nursing aides, orderlies, & attendants	\$10.81	\$9.10	\$10.58	\$12.45
Office clerks, general	\$10.34	\$7.98	\$9.88	\$12.19
Packers & packagers, hand	\$10.41	\$8.28	\$10.31	\$12.80
Machinists	\$15.42	\$11.96	\$14.61	\$18.93
Truck drivers, heavy & tractor-trailer	\$16.82	\$13.96	\$16.38	\$19.25
Registered nurses	\$23.24	\$20.55	\$23.78	\$26.30
Bookkeeping, accounting, & auditing clerks	\$12.47	\$9.63	\$12.16	\$14.68
Maintenance & repair workers, general	\$16.28	\$14.10	\$16.56	\$18.98
Secretaries, except legal, medical, & executive	\$11.45	\$9.57	\$10.85	\$13.14
Laborers & freight, stock, & material movers, hand	\$11.06	\$8.05	\$10.94	\$13.43
Customer service representatives	\$13.95	\$9.70	\$11.87	\$17.22
Waiters & waitresses	\$7.10	\$6.01	\$6.65	\$7.88
General & operations managers	\$41.38	\$23.04	\$34.94	\$52.02
1st-line supvsr/mgrs. of prod. & operating workers	\$22.22	\$16.24	\$20.60	\$25.99
Truck drivers, light or delivery services	\$10.36	\$7.74	\$9.76	\$12.62

Fond du Lac County is part of an area which includes Fond du Lac and Manitowoc counties.

Source: DWD, Office of Economic Advisors, special tabulation using EDS and OES 2003

Employment and Wages

With the exception of the manufacturing and construction industries, the average annual wage for the county is lower than the state-wide average. Overall the county's average annual wage is 92.7 percent of the state's. There are several areas that are quite low when compared to the state average. One is the professional and business services industry group at 73.4 percent of the state average, and the other is the leisure and hospitality industry at 76.4 percent of the state average.

Average Annual Wage by Industry Division in 2003

	Average Annual Wage		Percent of	I-year
	Wisconsin	Fond du Lac County	Wisconsin	% change
All Industries	\$ 33,423	\$ 30,974	92.7%	3.9%
Natural resources	\$ 25,723	\$ 22,665	88.1%	3.4%
Construction	\$ 40,228	\$ 40,596	100.9%	4.2%
Manufacturing	\$ 42,013	\$ 43,205	102.8%	6.8%
Trade, Transportation, Utilities	\$ 28,896	\$ 24,050	83.2%	1.3%
Information	\$ 39,175	suppressed	Not avail	Not avail.
Financial activities	\$ 42,946	\$ 36,778	85.6%	9.3%
Professional & Business Services	\$ 38,076	\$ 27,961	73.4%	3.4%
Education & Health	\$ 35,045	\$ 31,838	90.8%	2.2%
Leisure & Hospitality	\$ 12,002	\$ 9,174	76.4%	1.8%
Other services	\$ 19,710	\$ 16,847	85.5%	0.5%
Public Administration	\$ 35,689	\$ 32,451	90.9%	7.0%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

Manufacturing employs the greatest number of workers in the county with nearly 26 percent of the jobs in the county. It also provides the largest portion of wages paid in the county. Over 37 percent of the county's payroll come from this industry.

The trade, transportation and utilities group employs the next largest number of workers with 18 percent of the workers followed closely by the education and

health industry. Together these two industries employ more workers than the manufacturing industry does, but provided a smaller total percentage of the county's payroll. Although the manufacturing industry has declined recently, it remains as an important economic engine for the county. Jobs in this sector continue to pay well and contribute to the economic well being of the region.

2003 Employment and Wage Distribution by Industry in Fond du Lac County

	Employment		Total
	Annual average	I-year change	Payroll
Natural Resources	599	61	\$ 13,576,128
Construction	2,548	-6	\$ 103,438,412
Manufacturing	12,355	-654	\$ 533,798,035
Trade, Transportation, Utilities	8,864	-80	\$ 213,177,742
Information	suppressed	suppressed	suppressed
Financial Activities	1,607	39	\$ 59,101,742
Professional & Business Services	2,551	41	\$ 71,327,712
Education & Health	8,682	36	\$ 276,419,398
Leisure & Hospitality	4,301	-13	\$ 39,455,424
Other services	1,474	-40	\$ 24,831,773
Public Administration	2,452	-19	\$ 79,569,527
Not assigned	0	0	0
All Industries	46,620	-635	\$1,443,994,033

■ % of Total Employment
■ % of Total Payroll

Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2004

Per Capita Personal Income

Per capita personal income (PCPI) includes income from wages and self-employment, assets (dividends, interest, rent) and transfer payments (social security, insurance, welfare, pensions) divided by mid-year total population estimates.

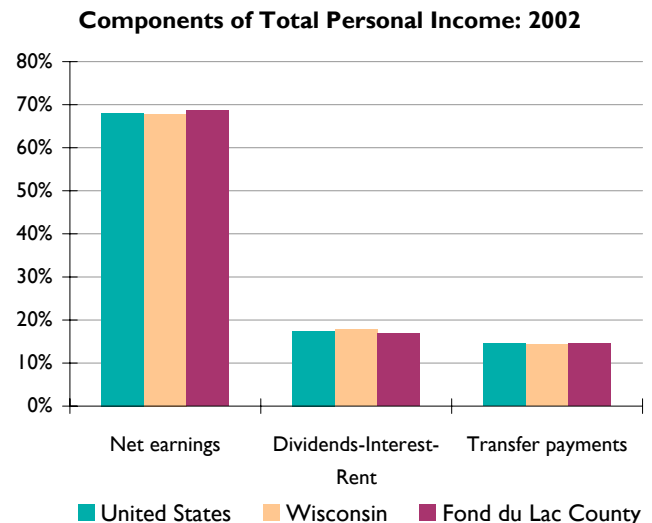
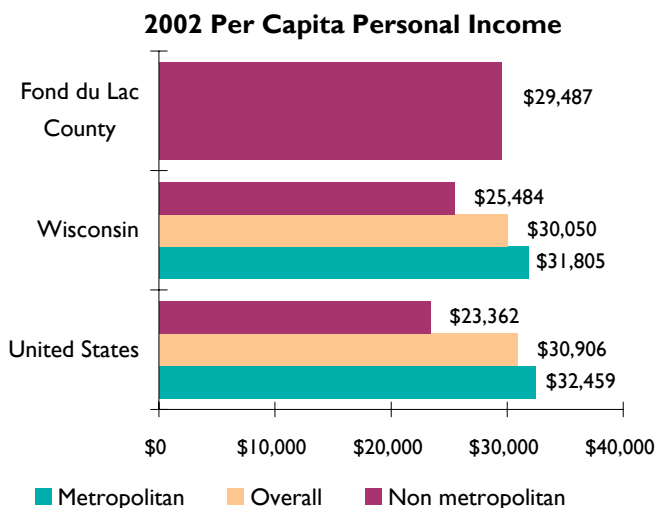
The majority of PCPI in Fond du Lac County comes from net earnings, with smaller percentages coming from dividends, interests payments and transfer payments. The percentage from net earnings is just slightly

higher than the state and national averages.

PCPI in the county was \$29,487 in 2002. While the percentage of PCPI from the various sources in the county are similar to the state and nation, total PCPI was lower than the state level of \$30,050 and the national level of \$30,906. The PCPI grew faster in the county during the last year than the state and nation, but grew slightly slower than the state and nation in the last five years.

	Per Capita Personal Income						Percent Change	
	1997	1998	1999	2000	2001	2002	1 year	5 year
United States	\$25,334	\$26,883	\$27,939	\$29,847	\$30,527	\$30,906	1.2%	22.0%
Wisconsin	\$24,514	\$26,175	\$27,135	\$28,573	\$29,361	\$30,050	2.3%	22.6%
Non-metropolitan WI	\$20,734	\$22,195	\$22,900	\$24,059	\$24,833	\$25,484	2.6%	22.9%
Fond du Lac County	\$24,325	\$25,798	\$26,354	\$27,721	\$28,629	\$29,487	3.0%	21.2%
In current dollars (adjusted to U.S. CPI-U)								
United States	\$28,397	\$29,670	\$30,170	\$31,181	\$31,010	\$30,906	-0.3%	8.8%
Wisconsin	\$27,478	\$28,889	\$29,301	\$29,850	\$29,825	\$30,050	0.8%	9.4%
Non-metropolitan WI	\$23,240	\$24,497	\$24,728	\$25,135	\$25,226	\$25,484	1.0%	9.7%
Fond du Lac County	\$27,266	\$28,473	\$28,458	\$28,961	\$29,081	\$29,487	1.4%	8.1%

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, May 2004



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2004

The county workforce profiles are produced annually by the Office of Economic Advisors in the Wisconsin Department of Workforce Development. The author of this profile and regional contact for additional labor market information is:

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Sheboygan, WI 53081
Phone: 920-459-3845
email: richard.seidemann@dwd.state.wi.us

Metropolitan Statistical Area (MSA) - A single county or group of counties that include at least one urbanized area with a minimum population of 50,000. Multiple-county MSAs have a central county or counties, which have a high degree of social and economic integration with the other member counties as measured by commuting data.

Non-metropolitan county - Any county that is not a member of a metropolitan statistical area.

Net Migration - One of two components of population change. It is the net result of individuals who either moved into or out of an area.

Natural Change - One of two components of population change. It is the result of the number of births minus the number of deaths in an area over a period of time. A natural increase indicates there were more births than deaths. A natural decrease indicates there were more deaths than births.

Employed - Persons 16 years of age or older, who worked as paid employees, or worked in their own business, profession or farm, or worked 15 hours or more as unpaid workers in a family-operated enterprise. Includes those temporarily absent from their jobs due to illness, bad weather, vacation, childcare problems, labor dispute, maternity or paternity leave, or other family or personal obligations.

Unemployed - Persons 16 years of age or older with no employment, who were available for work and made efforts to find employment sometime during the previous 4-week period ending with the monthly reference week. Persons who were awaiting recall to a job did not need to look for work to be classified as unemployed.

Labor Force - The sum of the employed and unemployed, whom are at least 16 years of age and older.

Unemployment Rate - The number of unemployed divided by the labor force. It is expressed as a percentage of the labor force.

Labor Force Participation Rate (LFPR) - The labor force divided by the total population aged 16 years and older. It is expressed as a percentage of the population aged 16 years and older.

Suppressed - Data is withheld or suppressed if it does not meet certain criteria. If an industry in a county has fewer than three employers or if a single employer employs 80% or more that industry's total employment in that county then the data are suppressed. These criteria were established to maintain the confidential reporting of payroll and employment by employers.

Total Personal Income - The aggregate income of an area received by all persons from all sources. It is calculated as the sum of wage and salary disbursements (less contributions for government social insurance), supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts that include retirement and veteran's benefits, government paid medical reimbursements, and income maintenance program payments.

Per Capita Personal Income (PCPI) - Total personal income divided by the total population.

Current Dollars - Phrase used to express historical dollar values in terms of their current purchasing power via inflation adjustment.

CPI-U - Consumer Price Index for all urban consumers, the most commonly used measure of inflation in the United States.